

Instructions for Using the Group and Individual Awards Templates
October 6, 2006

These instructions and templates are being provided by the NASA Shared Services Center (NSSC) Human Resources (HR) Awards group as a temporary measure to meet the NASA Center needs until the time that an official awards template is distributed.

Note: These instructions and the templates are only to be used until an approved, official awards template is provided.

These instructions are for use with the following documents:

- 2006-10-06TemplateGroupAward.doc
- 2006-10-06TemplateGroupDataforMerge.xls
- 2006-10-06TemplateIndividualAward.doc
- 2006-10-06TemplateIndividualDataforMerge.xls

It is recommended that you preserve the original documents as master documents and make copies of them to customize for your use. It is also recommended that you copy from the master each time you create an award merge to ensure integrity of the template elements.

To Use the Award Templates:

1. Copy the group or individual award template and paste into desired location on your computer.
2. Copy the group or individual data template and paste into desired location on your computer. (For ease of updating and merging information, it is recommended that you put both the award template and the data template copies into a separate folder and rename to suit the award. If you choose to use an Excel file that already has the information needed, it is suggested that you save a copy of the data file to the same folder as the award template.)
3. Open the data file and populate with the applicable information. If all certificates in this batch are to have common fields (e.g., Group Name, Director Name, Effective Date, etc.), you do not have to populate those fields. They can be manually added as detailed in these instructions. (These instructions are written for those using the data file template provided. If you choose to use an Excel file that already has the information needed, it is suggested that you make a note of the column headings and which worksheet in the file is to be used so that you can select the appropriate column headings as directed in this instruction.)
4. Open the award template. Make sure the **Paragraph Markings** button is selected to **Show** the markings. The following figure shows the Paragraph Markings button and the template with the markings shown:



Figure 1. Paragraph Markings Button and Award Template with Markings Shown

5. From the **Tools** menu, select the **Letters and Mailings** option, and then select the **Mail Merge** suboption. The Mail Merge wizard screen is displayed.
6. In the **Select document type** section, click the **Letters** radio button.
7. At the bottom of the wizard screen, click the **Next: Starting document** link.
8. In the **Select starting document** section, click the **Use the current document** radio button.

Note: At any point while working with the wizard, if you discover you need to modify previous actions, click the **Previous** link at the bottom of the wizard screen. This link will allow you to go backwards screen by screen through the wizard to locate any errors.

9. At the bottom of the wizard screen, click the **Next: Select recipients** link.
10. In the **Select recipients** section, click the **Use an existing list** radio button.
11. In the **Use an existing list** section, click the **Browse** link. The Select Data Source screen is displayed.
12. Locate the desired data file and click the **Open** button. The Select Table screen is displayed.
13. Click the name of the sheet and make sure the **First row of data contains column headers** check box is selected.
14. Click the **OK** button. The Mail Merge Recipients screen is displayed.
15. Make sure the check boxes are selected for each person receiving an award. Deselect any check boxes for blank lines or names not receiving an award.
16. Click the **OK** button.
17. At the bottom of the wizard screen, click the **Next: Write your letter** link.

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18. In the template, highlight the words: **AwardTitle**. Note that you should not highlight the paragraph marking at the end of the words for any of the lines. If you do, the font and alignment may be inadvertently changed. Use the Shift and Arrow keys to select only the words. You may have to press the Shift and Left Arrow keys to deselect the paragraph marking.
19. In the **Write your letter** section, click the **More items** link. The Insert Merge Field screen is displayed.
20. In the **Insert** section, select the **Database Fields** radio button.
21. In the **Fields** section, click the **AwardTitle** option.
22. Click the **Insert** button and then click the **Close** button.
23. In the template, highlight the words: **FirstName**. Do not highlight the space between the first and last name placeholders.
24. In the **Write your letter** section, click the **More items** link. The Insert Merge Field screen is displayed.
25. In the **Fields** section, click the **FirstName** option.
26. Click the **Insert** button and then click the **Close** button.
27. In the template, highlight the words: **LastName**. Do not highlight the space between the first and last name placeholders.
28. In the **Write your letter** section, click the **More items** link. The Insert Merge Field screen is displayed.
29. In the **Fields** section, click the **LastName** option.
30. Click the **Insert** button and then click the **Close** button.
31. If you are working with the group award template, proceed to the next step. If you are working with the individual award template, proceed to step 36.
32. In the template, highlight the words: **GroupName**. Do not highlight the space between the first and last name placeholders.
33. In the **Write your letter** section, click the **More items** link. The Insert Merge Field screen is displayed.
34. In the **Fields** section, click the **GroupName** option.
35. Click the **Insert** button and then click the **Close** button.
36. In the template, highlight the words: **Citation**.
37. In the **Write your letter** section, click the **More items** link. The Insert Merge Field screen is displayed.
38. In the **Fields** section, click the **Citation** option.
39. Click the **Insert** button and then click the **Close** button.
40. Are all awards in this batch going to be signed by the same person?
 - a. If all awards in this batch are going to be signed by the same person, proceed to step 41.
 - b. If all of the awards in this batch are not going to be signed by the same person, proceed to step 49.
41. Do you have an electronic signature file to import onto the award template?
 - a. If you do have an electronic signature file to import, proceed to step 42.
 - b. If you do not have an electronic signature file to import and you are going to have the certificates signed manually, click to select the **Signature** graphic on the template. Press the **Delete** key to remove the signature placeholder. Then, press the **Enter** key two times to correct the spacing. Proceed to step 46.

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42. Click to select the **Signature** graphic on the template. Press the **Delete** key to remove the signature placeholder. Do not move the cursor or make any changes at this point.
43. From the **Insert** menu, select the **Picture** option, and then select the **From File** suboption.
44. Locate the desired signature and click the **Insert** button. The electronic signature is placed on your certificate.
45. At this point, make any adjustments to the size of the signature file by clicking and dragging on a corner of the graphic. Do not distort the image by dragging any of the four sides. It is imperative that the signature maintain the proper proportions.
46. Select the **DirectorName** placeholder and type the name of the person signing the certificate.
47. Select the **DirectorTitle**, **CenterName** placeholder and type the appropriate information.
48. Select the **EffectiveDate** placeholder and type the appropriate information. Proceed to step 66.
49. Click to select the **Signature** graphic on the template. Press the **Delete** key to remove the signature placeholder. Then, press the **Enter** key two times to correct the spacing.
50. In the template, highlight the words: **DirectorName**.
51. In the **Write your letter** section, click the **More items** link. The Insert Merge Field screen is displayed.
52. In the **Fields** section, click the **DirectorName** option.
53. Click the **Insert** button and then click the **Close** button.
54. In the template, highlight the words: **DirectorTitle**. Do not highlight the comma or the space after the director title placeholder.
55. In the **Write your letter** section, click the **More items** link. The Insert Merge Field screen is displayed.
56. In the **Fields** section, click the **DirectorTitle** option.
57. Click the **Insert** button and then click the **Close** button.
58. In the template, highlight the words: **CenterName**. Do not highlight the comma or the space before the center name placeholder.
59. In the **Write your letter** section, click the **More items** link. The Insert Merge Field screen is displayed.
60. In the **Fields** section, click the **CenterName** option.
61. Click the **Insert** button and then click the **Close** button.
62. In the template, highlight the words: **EffectiveDate**.
63. In the **Write your letter** section, click the **More items** link. The Insert Merge Field screen is displayed.
64. In the **Fields** section, click the **EffectiveDate** option.
65. Click the **Insert** button and then click the **Close** button.
66. At the bottom of the wizard screen, click the **Next: Preview your letters** link.
67. You can preview individual certificates or edit the certificate list using the wizard screen instructions.
68. At the bottom of the wizard screen, click the **Next: Complete the merge** link.
69. In the **Merge** section, click the **Edit individual letters** link. The Merge to New Document screen is displayed.

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70. Make sure the **All** radio button is selected and click the **OK** button. The data merge is now complete and you can check each certificate for correct alignment and to ensure there are no certificates that run over to two pages.
71. Changes can be made to individual certificates from this file. Any changes made at this point will **not** be made in your original data file.
72. Save this file if desired. If you have an electronic signature placed on the award certificate, ensure you follow all security guidelines for protecting the signature.
73. Print.
74. Validate all printed copies.